

Pacific Northwest

NATIONAL LABORATORY

Columns indicate the entity performing the task described and all associated IT buildout necessary to complete the task.

Process

Action

Delay

Input/Output

Decision Point

Digital or Printed Document

Start

End

Reject/Error/Invalid

Not dictated by DOE

Callout/Notes

All REQUIREMENTS can be found in the Tools Requirements Document

Measured Rebate Initiated by The Aggregator/Installer for A Single-Family, Owner-Occupied Home

Building Owner	Aggregator/Installer	Vendor	State	3rd Party Back End	DOE Back End	
	<div>Start</div> <div>Estimate Energy Savings</div> <div>Initiate Rebate Request</div> <div>Submit Home Address and Estimated Savings</div> <div>Submit Household Eligibility</div> <div>End</div>		<div>Eligible Contractor List (Updated Daily)</div>	<div>Verify Contractor Eligibility</div> <div>Verify Eligibility</div> <div>Convert Home Address to Address ID</div> <div>Submit Eligibility Verification and Address ID</div> <div>Notify Building Owner</div> <div>Issue Rebate Coupon</div> <div>End</div>	<div>Generate Rebate Reservation</div> <div>Notify 3rd Party</div> <div>Use DOE-Approved Template to Create Rebate Coupon</div> <div>End</div>	
	<div>Income Eligibility Documentation</div> <div>Include estimate files when HPXML is available</div>			<div>Includes State-identified buffer</div>		
	<div>Reject/Error/Invalid</div>			<div>Must include:</div> <ul style="list-style-type: none">Ability to cancel rebate reservationRebate amount available for home/building address"Note: You are financially obligated to pay for any costs not covered by this coupon."		
<div>Building Owner Notification</div>						
	<div>Rebate Coupon</div>					
<div>Invoice Must Include:</div> <ul style="list-style-type: none">Total costEquipment and material costsRebate amount applied to equipment/material costs	<div>Provide Invoice and Project Certificate to Building Owner</div> <div>Project Certificate</div> <div>Invoice</div> <div>Pay Invoice (minus aggregator calculated rebate)</div>	<div>Purchase equipment and materials</div> <div>Perform Installation</div> <div>Collect Quality Installation Documentation</div> <div>Submit Proof of Upgrade Completion</div> <div>Must include:</div> <ul style="list-style-type: none">Building Owner install attestationInvoice (material, equipment, and rebate must be separate line items)Equipment purchase receiptInstallation/Remote QA Documentation				
	<div>End</div>					
	<div>12 Months</div> <div>Measure Energy Savings Using Weather-Normalized Utility Bill Calculations</div> <div>Submit Measured Savings and Utility Bills Used for Calculations</div> <div>End</div>					
<div>Measured savings must be calculated using an open-source software and reported in HPXML format</div>				<div>Validate Measured Savings and Compare to Estimated Savings Submission</div> <div>Issue Rebate Reimbursement for Measured Savings</div> <div>Submit Required Info to DOE</div> <div>Report All Project Information Necessary for DOE-Required State Retention</div> <div>End</div>		
	<div>Receive Rebate Payment</div> <div>End</div>					
				<div>Retain Required Project Information</div> <div>End</div>		

Notice and coupon must show:

- Approved rebate amount
- Rebate bucket (percentage)
- Address ID
- Coupon expiration date

If applicant is below 80% AMI and address is in a disadvantaged community, coupon must notify eligible entity representatives of the \$200 installation incentive.

U.S. DEPARTMENT OF ENERGY